

June 19, 2008

Dear Assembly Delegate:

The National Committee on Planned Giving is grateful for council and individual support of our mission and programs. Voluntary giving has made the difference in our ability to expand and improve services. We hope you and your council will consider making a gift to NCPG this year in support of our mission to increase the quality and quantity of charitable planned gifts.

You and your council can take pride in the ways that your support is leveraged to benefit the entire gift planning community. During this year's business meeting you will hear about a few of the special efforts and projects undertaken by NCPG on our behalf.

- The second edition of **Guidelines for Reporting and Counting Charitable Gifts** is being used by charities nationwide and has received the endorsement of the Association of Fundraising Professionals and the Association of Philanthropic Counsel.
- An updated **analysis of insurance** use in charitable giving will be completed this year, providing even more guidance as you evaluate new charitable insurance programs.
- NCPG is the lead organization promoting a **permanent and expanded IRA Charitable Rollover**. NCPG's proactive advocacy was instrumental in moving this provision forward through Congress. NCPG is leading the effort to reinstate the IRA rollover and expand the provision to include rollovers to split-interest charitable vehicles.
- NCPG has been **speaking on your behalf to Congress and the IRS** on issues as far-reaching as revisions to form 5227 and appropriate use of charitable lead trusts. NCPG is in the forefront of conversations on **charitable reform** measures.
- NCPG is currently working on creating **standards** in several areas of gift planning practice, **reaching out to charity leaders** who determine organizational gift planning priorities, and continuing to promote the charitable gift planning message through **research and media promotion**.

Many councils have added a special dimension to their gifts by structuring them in one or more of the following ways:

- Gifts to honor a speaker (in lieu of honorarium).
- Gifts to honor an important council leader, a retiring council member, or in recognition of a council award.
- Gifts to fund a particular NCPG project or a specific activity like government relations or research.
- Gifts to support NCPG's activities that serve councils, such as the Council Leaders Workshop or strategic planning assistance.

Many individuals have designated their gifts to particular areas:

- **Unrestricted (special projects):** As you know from your own experience, these are the most helpful gifts. The Board of Directors will direct these funds to the areas where they are most needed. By providing funds for special projects your gifts help NCPG respond to immediate needs and issues. Special projects gifts have helped make possible NCPG's activities in support of the IRA charitable rollover, the Strategic Directions project, and funds for developing the insurance and counting guidelines tools.
- **Designated gifts:** You may designate your gift to any area of NCPG's programs, such as government relations, research, or education for example.

- **Planned Giving Today's NCPG Operation Endowment:** Through a generous gift from *Planned Giving Today* and its publisher, G. Roger Schoenhals, NCPG is building an endowment for future operations. The rapid expansion of the gift planning profession makes it difficult to predict how our members' needs may develop. Your operations endowment gift will help NCPG move confidently into the future.
- **Palisca Keitel Leadership Endowment:** This endowment, created by former NCPG board member Elizabeth Keitel, provides funds to help train and support the NCPG leaders of today and the future.
- **NCPG Endowment:** NCPG has created a board-designated endowment to provide ongoing support to activities in key areas. Your endowment gift will help fund ongoing resources for these areas in the future.

We will be recognizing our NCPG donors for 2008 at the National Conference on Planned Giving in October, if your gift or pledge is received prior to September 1. All gifts are welcome. Councils and individuals who give \$1,000 or more during the calendar year are recognized in our Charles Johnson Fellows giving category.

Thank you for your continued support of NCPG.

Sincerely,

A handwritten signature in black ink, appearing to read "Russ Howes". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Russ Howes
Chair